

Message Text

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ACTION EB-07

INFO OCT-01 ARA-10 ISO-00 COA-01 COME-00 CIAE-00 INR-07

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TO SECSTATE WASHDC 4020

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E.O. 11652: N/A

TAGS: EAGR, PE

SUBJ: ANCHOVY SITUATION

AGATTACHE PREPARING REPORT ON 1974 FISH MEAL AND OIL WITH
OUTLOOK FOR 1975. SUMMARY DATE FOLLOW:

1. TOTAL 1974 FISH CATCH FOR MEAL 3,867,437 M.T. OF
WHICH 92.6 PERCENT ANCHOVIES. TOTAL MEAL PRODUCED
3,867,437, ABOUT 93 PERCENT ANCHOVY. CRUDE OIL
PRODUCTION 210,887 M.T. PRODUCTION FOR 1975 STILL
FORECAST 6 MILLION M.T. TOTAL CATCH, 1.4 MILLION MEAL
AND PERHAPS 220,000 OIL.

2. EXPORTS FISH MEAL 631,000 M.T. IN 1974 AND FISH OIL
85,000. TOTAL VALUE OF EXPORTS ABOUT \$250 MILLION.

3. CONSUMPTION 1974 ESTIMATED 120,000 M.T. MEAL AND
80,000 M.T. OIL WITH 1975 CONSUMPTION FORECAST AT
135,000 AND 120,000, RESPECTIVELY.

4. CURRENT EXPORT MOVEMENT SLOW WITH CIF PRICES RE-
PORTED ABOUT \$225/M.T. FOR MEAL AND \$440 FOR SEMI-
REFINED OIL. EPCHAP CONSIDERS LEVELS EQUAL OR BELOW
COSTS OF PRODUCTION BUT IS INITIATING CAMPAIGN FOR
SALES TO SOCIALIST COUNTRIES.

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5. OCEAN CONDITIONS CONSIDERED VERY FAVORABLE AND CURRENT

EXPLORATORY FISHING ALL ALONG COAST PROGRESSING WELL WITH ABOUT HALF MILLION M.T. MOSTLY ANCHOVIES ALREADY CAUGHT. THERE REPORTS OF POSSIBILITY NEW NINO MOVEMENT UNDER WAY THAT COULD AFFECT FISHING LATE 1975 AND THIS UNDER INVESTIGATION. THERE ALSO INDICATIONS THAT TOTAL ANCHOVY STOCK MAY NOT YET SURPASS 6 MILLION M.T., THEREFORE CONSIDERABLE DISCUSSION IN PROCESS WHETHER FISH FULL SCALE IN 1975 OR WITH RESTRICTIONS.

6. NO ANNOUNCEMENT YET REGARDING DATE FOR INITIATING COMMERCIAL ANCHOVY SEASON BUT BELIEVE IT WILL BE EARLY MARCH. IT'S LIKELY THAT FULL FLEET OF NEARLY 700 BOATS WILL DIVIDE INTO TWO SECTIONS FOR FISHING ALTERNATE WEEKS. DESPITE LOW MEAL PRICES AND POSSIBILITY OF NINO RECURRENCE, THERE CONSIDERABLE SOCIAL PRESSURE TO FISH AS MUCH AS POSSIBLE. WILL ADVISE ON FUTURE DEVELOPMENTS.
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